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ABSTRACT

This task force report examines enrollment trends, school building utilization, school size, and school cost savings in the Madison, Wisconsin, elementary schools. Although the task force's study was confined to elementary schools, many of its findings and recommendations are applicable to middle and high schools as well. Enrollments in many Madison elementary schools have declined, although a few have experienced slight increases in enrollment. The task force was charged with developing a process for decision-making regarding school closings, developing criteria for alternative building use, and increasing local student enrollment in those schools located in transitional neighborhoods. The task force recommended that surplus space either be rented or used for community purposes, that communication among governmental agencies and the school board be strengthened, and that the task force conduct surveys to ascertain public opinion and educational needs. (Author/DS)

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REPORT OF THE TASK FORCE ON DECLINING ENROLLMENT

AUGUST 1975

EA 008 365

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Charges to the Task Force

- The development of a process for making decisions and seeking community acceptance regarding the possible closing of individual schools.

- The development of criteria and procedures for the alternative use and operation of school buildings, in whole or in part, for other community purposes.

- The development of affirmative courses of action that should be taken cooperatively by local governmental bodies and other community organizations to support and increase the local student enrollment in those schools located in transitional neighborhoods.

TABLE OF CONTENTS

	Page
INTRODUCTION	
ENROLLMENT TRENDS	1
DEVELOPMENT OF MASTER PLAN FOR SCHOOLS FACILITIES	3
SCOPE OF REPORT	
CREATION AND CHARGES TO THE TASK FORCE	6
ORGANIZATION AND WORK OF TASK FORCE	8
ELEMENTARY SCHOOLS	
ENROLLMENTS	11
SCHOOL UTILIZATION	13
SCHOOL SIZE AND SCHOOL COST SAVINGS	13
RECOMMENDATIONS	
UPDATING AND ADOPTION OF MASTER PLAN FOR SCHOOL FACILITIES	24
ADOPTION OF POLICIES	25
ANNUAL REVIEW OF ENROLLMENTS AND ELEMENTARY SCHOOLS	31
COMMUNITY USE OF SCHOOL BUILDINGS	38
LOW ENROLLMENT AND TRANSITIONAL NEIGHBORHOODS	43
APPENDIXES	
APPENDIX A - MAGNET SCHOOLS	46
APPENDIX B - ANNUAL REVIEW OF ENROLLMENTS AND ELEMENTARY SCHOOLS	47
APPENDIX C - BOUNDARY CHANGE TASK FORCE	49
APPENDIX D - CLOSE/NO CLOSE TASK FORCE	50
APPENDIX E - RENTAL OF SPACE IN OPERATING SCHOOL BUILDINGS	53
APPENDIX F - RENTAL OF SPACE IN DISCONTINUED SCHOOL BUILDINGS	55

INTRODUCTION

Since the state-wide redistricting in July 1962, Madison Public Schools (Madison Joint School District No. 8) has comprised the City of Madison, the Villages of Shorewood Hills and Maple Bluff, the Town of Madison, and portions of the Towns of Burke, Blooming Grove, and Fitchburg. At present, the district has an area of about 63 square miles and a total population of about 190,000. The City of Madison comprises most of the district with about 51 square miles and about 170,000 persons.

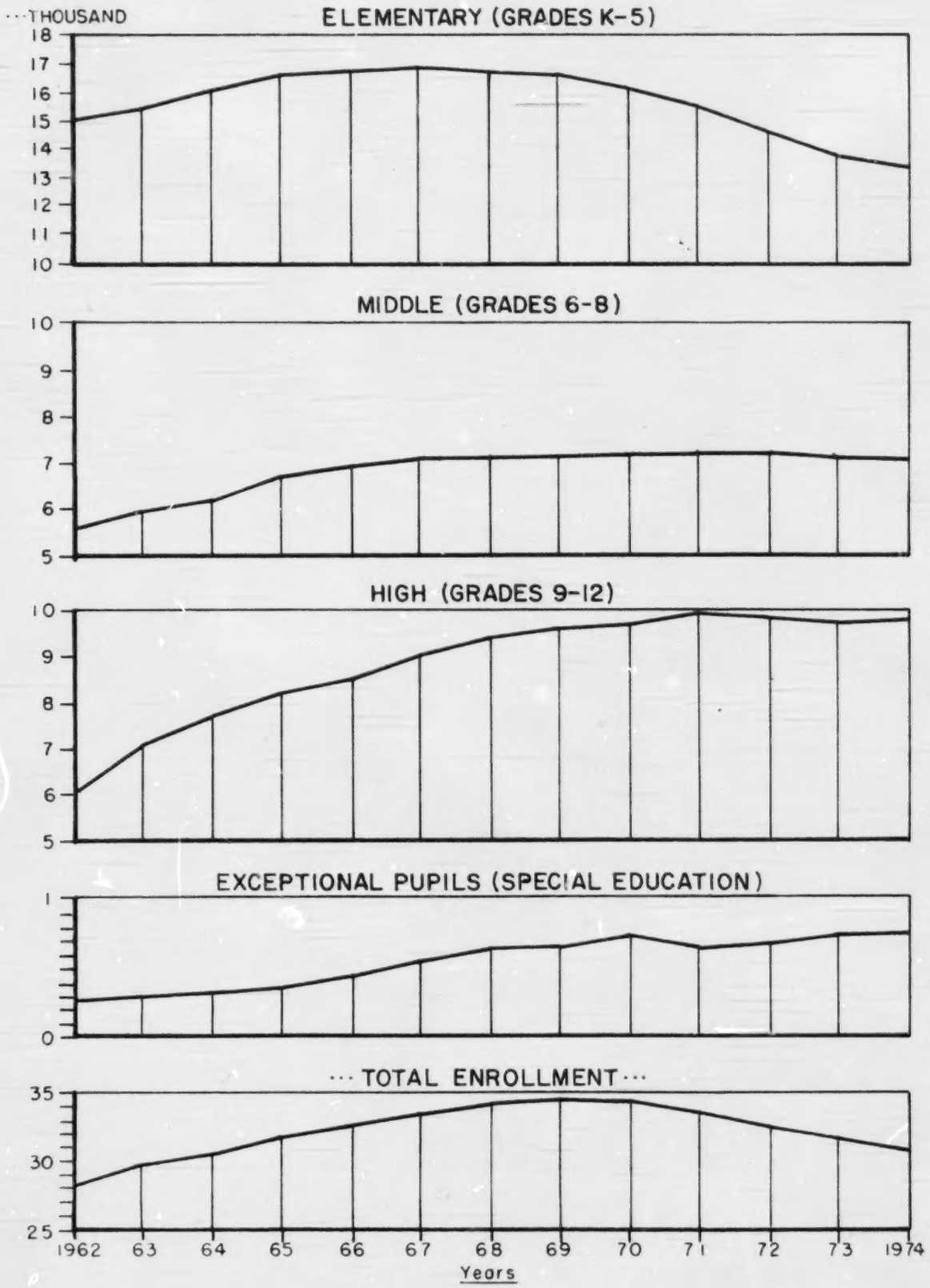
ENROLLMENT TRENDS

In September, 1962, the total enrollment for Madison Public Schools was 27,118. (See Chart 1) The enrollment increased to a peak of 34,317 in 1969 followed by a decline to 30,982 in September, 1974. In all likelihood, the enrollment decrease will continue at least through the 1980's.

The elementary (grades Kindergarten through 5) enrollment has experienced the largest numerical decrease. After reaching its peak of 16,971 in September, 1967, the elementary enrollment has declined annually to 13,427 in September, 1974 - a numerical loss of 3,544 students since 1967. It is anticipated that this downward trend will continue at least through the early 1980's. The single largest contributor to the decline in elementary enrollment is the decrease in resident births from 1961 through 1973. However, the number of resident births increased slightly in 1974 over that of 1973, and if the number of births should continue to increase annually, the elementary enrollment will experience an upward trend beginning in the mid-1980's.

CHART 1

Actual Enrollments···(1962–1974)



The middle school (grades 6 through 8) enrollment reached its peak of 7,488 in September, 1970, and has experienced annual decreases since. In September, 1974, the enrollment was 7,103 or a loss of 385 students since its peak year of 1970. The middle school enrollment will continue to decline following the earlier elementary decreases.

The high school (grades 9 through 12) enrolllment, which peaked at 9,907 in September, 1971, decreased to 9,712 in September, 1974. This decline can be attributed to such causes as outmigration and "drop-outs". The high school enrollment, however, will decrease more in the future to correspond with the earlier middle and elementary enrollment decreases.

The enrollment for exceptional pupils* has increased from 294 in September, 1962, to 740 in September, 1974. About one-half of the 740 pupils are non-residents of Madison Joint School District No. 8. The 740 pupils include only those who spend most of their time in self-contained classrooms. There are about 2500 regular students** who spend part of their time in certain special education programs. It is anticipated that the number of exceptional pupils will increase steadily in the future.

DEVELOPMENT OF THE MASTER PLAN FOR SCHOOL FACILITIES

The present organization of Madison Public Schools, was based primarily on the Proposed Plan for Reorganization of Joint School District 8, Madison, Wisconsin, commonly referred to as the Master

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* Exceptional pupils-students who require special educational services for a majority of their school day.

** Regular students-students in non-special education classes. These may require some special educational services, however, such as a speech therapist, psychologist, social worker, etc.

Plan for School Facilities. The Master Plan was developed by the staffs of both the Madison City Planning Department and Madison Public Schools in conjunction with the Madison Board of Education beginning in late 1968 and completed in February, 1970. After public discussions of the Master Plan at several public hearings, the Board of Education initially implemented some of the Plan's recommendations and proposals in April, 1970, to be effective the following fall semester. Other proposals were implemented in phases due to additions as well as renovations needed at existing middle and high school buildings. There was also a need to conduct teacher in-service training programs, especially in the middle schools.

The Master Plan was intended to serve as a general guide for developing school facilities over a period encompassing approximately 20 years. The Plan contained both educational goals, and school objectives and policies which were relevant to the development of a long-term plan for school facilities. It also contained data on actual and projected enrollments, an inventory of school sites and school buildings, the latter in terms of educational adequacies, enrollment capacities and building utilization. In addition, the Plan outlined a method to reorganize the entire school district from a K6-3-3 to a K5-3-4* basis, including the following:

(1) the establishment of 4 geographic areas, with each area having 1 high school, 2 or 3 middle schools,

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* K6-3-3 to K5-3-4 - The school district reorganized grade level groupings. Elementary schools changed from Kindergarten through sixth grade to Kindergarten through fifth grade; junior high schools changed from a seventh through ninth grade grouping to middle schools with a sixth through eighth grade grouping; and high schools changed from three grade levels of tenth through twelfth grade to four grade levels of ninth through twelfth grade.

and approximately 6 through 9 elementary schools, the number to be determined by the enrollment sizes of the elementary schools,

(2) the establishment of a feeder school concept to maintain both vertical and geographic continuity, whereby students from approximately 3 elementary schools would attend 1 middle school, and all students from 1 middle school would attend the same high school.

(3) proposals for future school attendance areas,

(4) change of use and discontinuance of certain existing schools,

(5) construction of new schools, and additions and renovations to some existing schools, and

(6) advance acquisition of new school sites.

Based on the Master Plan, the 4 geographic areas were created, and the feeder school concept established in almost all cases within each of the 4 areas. All of the proposed additions and renovations were completed for each of the 4 high schools, which were transformed from a 3-grade senior high to a 4-grade high school with a comprehensive educational program. Most of the proposed additions and renovations were made to the junior high schools which were to incorporate the middle school program. The middle school attendance areas have also been established as proposed in the plan with the exception of Lincoln Middle. Since Van Hise and Cherokee Middle Schools could both accommodate more students, Lincoln Middle was not enlarged to increase its enrollment capacity, and thus its proposed attendance area was reduced. At the elementary level, Cherokee, Dudgeon, Nakoma, Lakewood,

Badger, Silver Springs, and Sunnyside were all discontinued as proposed in the Plan, while Thoreau Elementary was constructed to replace Cherokee, Dudgeon and Nakoma Elementary Schools. Leopold was constructed to replace Silver Springs. Although several elementary sites were proposed for advance acquisition, only one site near the Marlborough Heights Subdivision was actively pursued for acquisition because of new residential development in the area.

Although many proposals cited in the Master Plan were implemented by the Board of Education, the Board did not officially adopt the entire Plan. Furthermore, the Master Plan has neither been reviewed nor updated since its development in 1970.

SCOPE OF REPORT

At present, there are 33 elementary schools, 10 middle schools, 4 high schools, and one special education facility to serve all of the Madison Public Schools' students. Although many schools are experiencing enrollment declines, there are a few schools which have increasing enrollments because most of their students come from new residential growth areas. For some schools experiencing large enrollment decreases, there is the potential for agencies outside of Madison Public Schools to rent surplus space for different types of community uses. For certain elementary schools with small enrollments and anticipated future enrollment declines, there is also the potential to be closed.

CREATION AND CHARGES TO THE TASK FORCE

The Madison Board of Education and the Madison Common Council have expressed concerns about the enrollment declines, particularly in regard to possible school closings, the effects such closings will have on residential neighborhoods, and the alternative uses of any

discontinued building. Both the Board and the Council have also expressed interest in using school buildings with surplus space for other community uses along with the regular school programs. Both have also agreed that the issue of discontinuing certain schools and using certain school buildings for other community uses cannot be considered or resolved satisfactorily without joint coordination and cooperation.

In July, 1974, both the Madison Board of Education and the Madison Common Council adopted a similar resolution creating this Task Force. Based on the resolution, the Task Force was also given the following charges:

(1) "The development of a process for making decisions and seeking community acceptance regarding the possible closing of individual schools."

(2) "The development of criteria and procedures for the alternative use and operation of school buildings, in whole or in part, for other community purposes."

(3) "The development of affirmative courses of action that should be taken cooperatively by local governmental bodies and other community organizations to support and increase the local student enrollment in those schools located in transitional neighborhoods."

Although the above charges pertained to all schools, the Task Force only reviewed and considered the elementary schools. The primary reason for considering only the elementary schools is that there was more potential for school closings and community use of buildings with regular school programs in elementary schools than in

middle and high schools. However, some of the recommendations cited in this report, although intended for elementary schools, are applicable to both middle and high schools.

In terms of the first charge relating to the possible closing of schools, there is a strong consensus by the Task Force members to work toward objectives which would make it possible to keep schools open. The Task Force views the schools not only as a community investment but also as a resource that gives residential neighborhoods vitality and make them a more desirable place to live.

ORGANIZATION AND WORK OF TASK FORCE

The Task Force was organized in late September, 1974 and began its work about one month later. Its 14 members comprised the following: 8 citizen members representing different parts of the school district, 2 Madison Common Council members, 2 Board of Education members, 1 teacher representative, and 1 school administration representative.

Some of the Task Force's effort was initially spent in attempting to resolve specific problems, especially on usage and operational costs of the Dudgeon Building, a discontinued public elementary school now housing a day care center and a private elementary school. The Task Force's studies culminated in a report (Proposal for Dudgeon Building) in February, 1975, to both the Board of Education and Madison Common Council citing alternatives and recommendations on ownership, management, and funding for the Dudgeon Building.

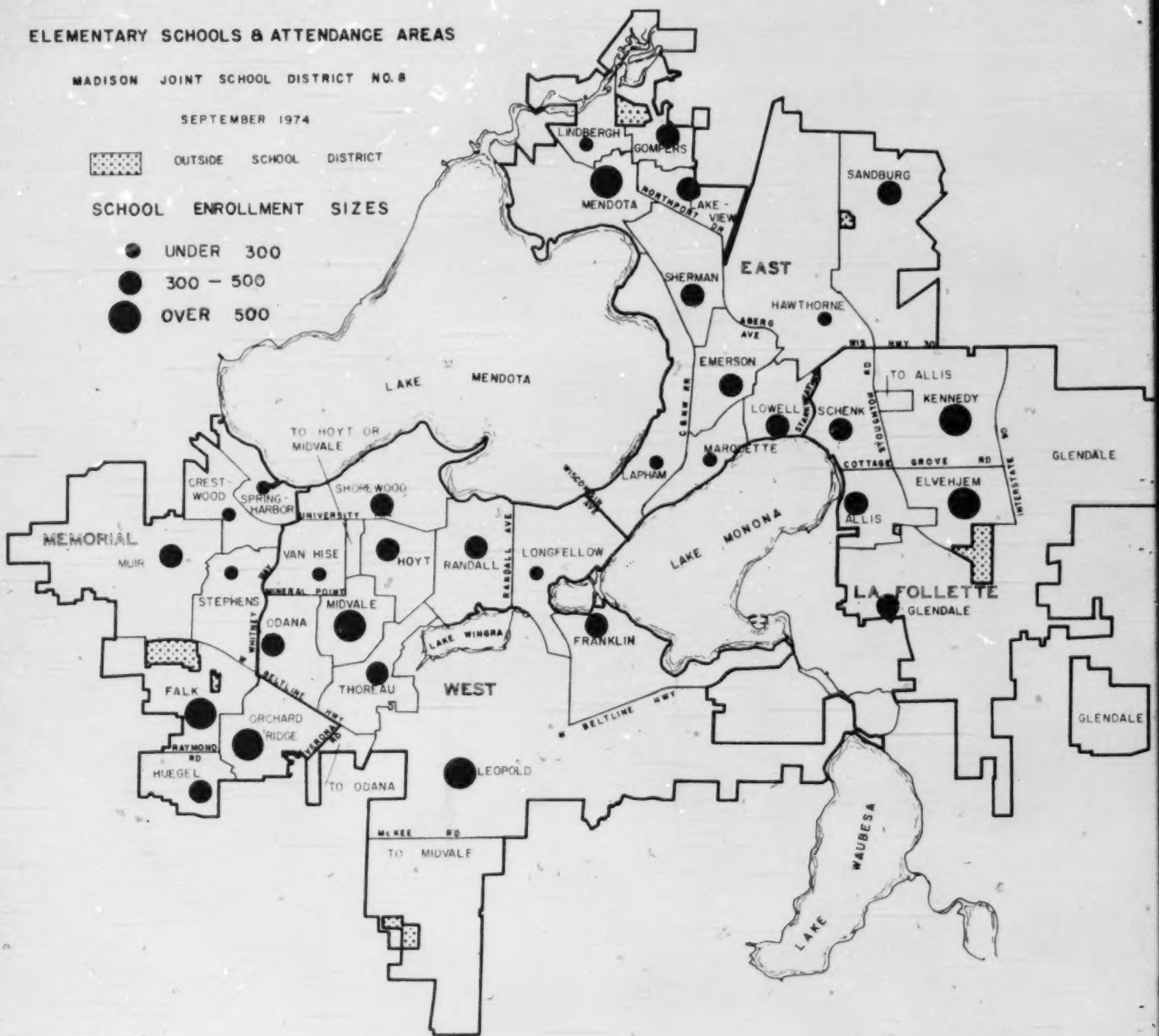
After completing its report on the Dudgeon Building, the Task Force concentrated all of its efforts on those items relating to its 3 specific charges. These included studies on enrollment sizes of elementary schools and their effect on the educational program,

operating costs of elementary schools, school boundary changes and potential school closings, community uses of school buildings, rentals of surplus school space, and housing and enrollment problems in the central part of the school district.

ELEMENTARY SCHOOLS

Of the 33 elementary schools, 26 are housed in a separate building, 6 are housed with a middle school, and 1 is housed in a building with a small alternative high school unit. The enrollment size of the elementary schools varies from a low of 172 at Longfellow to a high of 768 at Leopold. The distribution of elementary schools are as follows: Memorial Area - 7, West Area - 10, East Area - 11, and LaFollette Area - 5 (see Map 1).

MAP 1


ELEMENTARY SCHOOLS & ATTENDANCE AREAS
MADISON JOINT SCHOOL DISTRICT NO. 8
SEPTEMBER 1974
OUTSIDE SCHOOL DISTRICT
SCHOOL ENROLLMENT SIZES
UNDER 300
300 – 500
OVER 500
LINDBERGH
GOMPERS
MENDOTA
LAKE-VIEW
SANDBURG
EAST
SHERMAN
HAWTHORNE
EMERSON
LAKE MENDOTA
TO ALLIS
KENNEDY
LOWELL
SCHENK
MARQUETTE
LAPHAM
GLENDALE
ELVEHJEM
TO HOYT OR MIDVALE
CREST-WOOD
SPRING-HARBOR
SHOREWOOD
MEMORIAL
MUIR
VAN HISE
HOYT
RANDALL
LONGFELLOW
LAKE MONONA
ALLIS
LA FOLLETTE
GLENDALE
STEPHENS
MIDVALE
ODANA
FRANKLIN
LAKE WINGRA
FALK
THOREAU
WEST
ORCHARD RIDGE
HUEGEL
TO ODANA
LEOPOLD
TO MIDVALE
LAKE WAUBESA

ENROLLMENTS

The following are the September, 1974 elementary enrollments, excluding special education, for each school in the 4 different areas:

MEMORIAL AREA

Spring Harbor -	250
Crestwood -	241
Stephens -	225
Muir -	418
Falk -	522
*Orchard Ridge -	689
Huegel -	338

WEST AREA

Shorewood -	456
Hoyt -	304
*Van Hise -	235
Odana -	471
Midvale -	506
Thoreau -	439
Randall -	439
**Longfellow -	172
Franklin -	447
Leopold -	745

EAST AREA

Lapham -	204
*Marquette -	252
Lowell -	384
Hawthorne -	290
Sandburg -	307
Emerson -	367
*Sherman -	367
Lakeview -	354
*Gompers -	452
Lindbergh -	298
Mendota -	519

LAFOLLETTE AREA

*Schenk -	432
Kennedy -	655
Allis -	472
Glendale -	431
Elvehjem -	630

* Housed with a middle school.
** Housed with an alternative high school.

Of the 33 elementary schools, 9 can be considered small schools with enrollments of less than 300, 17 with enrollments of 300-500, and the remaining 7 with enrollments in excess of 500.

Although enrollments have been declining or have stabilized in most elementary schools, there are some schools which are experiencing enrollment increases because of new residential construction in their attendance areas. These schools with enrollment increases or future potentials for enrollment increases are located along the periphery of the school district.

In the Memorial Attendance Area, Falk and Muir have been experiencing enrollment increases resulting in overcrowding in both schools. Some of the Falk students have attended Orchard Ridge,

while some of the Muir students will attend Crestwood beginning September, 1975. There is great potential for more residential construction in both the Falk and Muir Districts, which will result in additional students. Although Huegel's enrollments have remained relatively the same, there is potential for more residential construction in its district, thus the possibility also of more students.

In the West Attendance Area, only Leopold has been increasing in enrollment, resulting in overcrowding at that school. Some of Leopold's students are now being transported to Midvale, and in all likelihood, additional Leopold students will be transported to other schools. Leopold is the only geographic area within the West Attendance Area with a large potential for new residential construction.

In the East Attendance Area, only Sandburg has increased in enrollment. It may have further increases because of a potential for more new residential construction. Although Gompers and Lindbergh have previously experienced enrollment increases, their enrollments have remained about the same. There is a potential for future residential construction around Gompers and Lindbergh which will result in additional students.

In the LaFollette Attendance Area, Kennedy and Elvehjem, which had enrollment increases earlier, have recently experienced slight enrollment declines. Because of such earlier enrollment increases, some students from Kennedy and Elvehjem have been transported to Allis. However, there are potential areas for new residential construction around Kennedy and Elvehjem, which could also result in more students for both schools.

The elementary schools in the central part of the school district have recently experienced stabilized enrollments or small enrollment declines. Most of the areas around central city elementary schools

have little or virtually no potential for new residential construction. Elementary schools between the central and peripheral parts of the school district, however, have experienced large enrollment declines and some will still continue to decline. These schools such as Van Hise, Midvale, Odana, Hawthorne, Lakeview, Sherman, Schenk, Allis, and Glendale, had enrollment increases during the 1950's and early 1960's when the school district experienced large-scale new residential construction consisting primarily of single-family homes. Because of available classroom space, some of these schools, such as Midvale, Odana, Allis, and Glendale, are now serving students from other overcrowded schools. Only a few areas around elementary schools in this part of the school district have some potential for new residential construction.

SCHOOL UTILIZATION

The utilization (this is the ratio of actual enrollment to school capacity) of all 33 elementary schools in September, 1974, averaged about 80 percent. The rate of school use varied from a low of about 60 percent at Crestwood to a high of about 95 percent at Falk (see Table 1). Although Crestwood had the lowest school utilization, its use will increase in September, 1975, when some Muir students are transported to Crestwood.

It can be assumed that elementary schools with utilization of less than 80 percent may have some available "surplus space". Most of these schools with "surplus space" are not located in the peripheral parts of the school district.

SCHOOL SIZE AND SCHOOL COST-SAVINGS

In attempting to consider the specific charge regarding the possible closing of schools, the Task Force conducted some studies to determine the relationship of school size to educational quality and whether there may be cost savings in school closings.

TABLE 1

CAPACITIES AND UTILIZATION OF ELEMENTARY SCHOOLS (SEPTEMBER 1974)

ELEMENTARY SCHOOL (By Attendance Area)	SCHOOL CAPACITY*	SCHOOL ENROLLMENT (September 20, 1974) GRADES K-5	SPECIAL EDUCATION	TOTAL	SCHOOL UTILIZATION**
MEMORIAL AREA					
Spring Harbor	383	250	5	255	66.6
Crestwood	410	241	13	244	59.5
Stephens	403	225	23	248	61.5
Muir	537	418	12	430	80.0
Falk	550	522	--	522	94.9
Orchard Ridge	733	689	4	693	94.5
Huegel	375	338	--	338	90.1
WEST AREA					
Shorewood	625	456	--	456	73.0
Hoyt	425	304	--	304	71.5
Van Hise	283	235	8	243	85.9
Odana	525	471	--	471	89.7
Midvale	585	506	11	517	88.4
Thoreau	475	439	--	439	92.4
Randall	516	439	17	456	88.4
Longfellow	225	172	--	172	76.4
Franklin	541	447	17	464	85.7
Leopold	816	745	23	768	94.1
EAST AREA					
Lapham	338	204	86	290	85.8
Marquette	300	252	--	252	84.0
Lowell	610	384	8	392	64.2
Hawthorne	457	290	40	330	72.2
Sandburg	425	307	--	307	72.2
Emerson	578	367	33	400	69.2
Sherman	533	367	14	381	71.5
Lake View	533	354	10	364	68.3
Gompers	533	452	11	463	86.9
Lindbergh	375	298	--	298	79.5
Mendota	668	519	18	537	80.4
LAFOLLETTE AREA					
Schenk	533	432	10	442	82.9
Kennedy	735	655	12	667	90.7
Allis	747	472	54	526	70.4
Glendale	641	431	44	475	74.1
Elvehjem	700	630	--	630	90.0

*Based on 25 students per general classroom and 50 students per kindergarten classroom. Kindergarten classrooms are used in morning and afternoon sessions. In calculating school capacity, the art, music, gymnasium, and instructional materials center are excluded.

**Percent of total enrollment to school capacity.

School Size

After reviewing some reports and literature, it was the Task Force's conclusion that there was very little information regarding the size of elementary schools to educational program. However, of the available reports, many were based on opinion surveys of school superintendents, principals, teachers, parents, and school consultants, rather than on actual research on pupils' outcomes and their school environment. Thus, there were no conclusive evidences to indicate that a better educational program could be obtained in either a small or a large elementary school.

However, some of the advantages listed for small schools were as follows:

(1) Class sizes are usually small, thus providing for more child-child interaction and teacher-child interaction.

(2) Teachers are often more knowledgeable about the special needs, talents and problems of the children they are teaching, than teachers from larger school community settings.

(3) The small school, especially with declining enrollment and uneven distribution of pupils by grades, is more likely to utilize innovative teaching methods and to encourage individual teaching and open classroom situations with working groups that cut across grade levels.

(4) Small schools provide a "family atmosphere" in which teachers can know all of the children and many of their parents, and can develop close, supportive relationships with both groups.

(5) The community has a close relationship to the school and is likely to provide volunteers and other support to the school, which may, in turn, serve as a community center.

Some of the disadvantages for a small school were as follows:

(1) Staffing a small school may be difficult because when enrollment is declining and pupils are not evenly distributed by grade, allocating staff may result in awkward combinations.

(2) A smaller professional staff has proportionately fewer diverse approaches and specialties to offer, thus staff members have fewer colleagues with whom to share ideas and experiences.

(3) Children are limited in contact with other students because the student body of a small school, which usually draws from a small area, is more likely to be homogenous than that in a larger school.

(4) In small schools, a specialist has less opportunity to group children with related problems; and since the specialist has to divide time between several small schools, time is lost in travel, and there is less opportunity to know the students.

It may be concluded that school size is not the determining factor in the quality of a child's education. Other factors, such as the principal's leadership, the abilities and dedication of the teaching staff, and parental support and involvement, are probably more important.

School Cost-Savings

Defining the cost-savings to be realized after closing a school with declining enrollment proved a difficult task. The Task Force first studied the actual budget expenditures for several schools (see Table 2). These expenditures were compared with the average expenditure for elementary schools in the school district. Comparisons were made on a per pupil and per classroom basis. It is evident that there are broad variations in the data with little explanation as to why the variations exist. For example, the combined costs for specialized educational services and regular programs per pupil and per classroom for School "A" vary from those costs of School "C". These facts led the Task Force to ask further questions and to explore additional data. The general program data from individual schools was the most valuable source.

Table 3 includes general program data and illustrates that the programs in each building are unique. For example, School "B" allocates eight rooms or 40% of its total space to children in the regular elementary school program. On the other hand, eleven rooms, 55% of the building, are allocated to children receiving specialized educational services. The per pupil and per classroom costs for School "B", compared with the school district's average or another school's average, appear disproportionate. Recognizing that the costs include a large specialized educational services program, which has both a lower pupil-teacher ratio and smaller class size, gives a more accurate perspective to the data.

TABLE 2

ACTUAL SCHOOL COST COMPARISONS (1974)

BUDGET DESCRIPTION	SCHOOL A	SCHOOL B	SCHOOL C	SCHOOL D	SCHOOL E	School District Average
1. Personnel Expenses						
a. Administrative	$ 17,523	$ 16,963	$ 19,313	$ 12,050	$ 16,788	$ 17,158
b. Teachers, Librarians & Interns	184,538	144,449	220,618	157,865	156,001	224,126
c. Substitute Teachers	9,474	2,227	2,240	2,439	7,712	4,273
d. School Aides	872	2,907	1,453	4,942	3,808	4,109
e. Lunch Supervision	2,231	1,924	2,254	1,665	1,189	2,297
f. Clerical	8,196	8,710	8,520	8,123	8,106	9,167
2. Other Instructional Resources	13,302	22,036	13,659	10,125	29,732	20,768
3. Local Programs						
a. Intramurals	577	577	577	577	577	636
4. Facility Expense						
a. Custodians	29,080	47,810	33,191	22,133	22,870	24,845
b. Heat, Water, Electricity & Telephone	9,768	17,648	14,100	8,817	8,564	11,677
c. Custodial Supplies & Equipment	3,330	2,885	1,781	988	3,195	1,680
d. Repairs & Replacement (Building & Sites)	2,245	4,211	3,494	604	1,990	4,282
e. Improvements & Additions (Buildings & Sites)	8,104	3,524	3,092	409	564	1,329
f. Repairman Salaries	1,987	3,988	2,082	639	2,901	-
g. Salary of Tunnel Guard	335	-	-	-	-	-
TOTAL COST	$291,562	$279,859	$326,374	$231,200	$263,997	$326,347
SES: Salaries	10,830	48,350	8,370	670	710	
Instructional Materials	970	2,530	200	90	260	
TOTAL & SES	$303,362	$330,739	$334,944	$231,960	$264,967	
Regular & SES Programs						
Per Pupil Cost	$ 916	$ 1,140	$ 854	$ 910	$ 863	
Per Classroom Cost	17,845	17,407	19,703	19,330	20,282	
Regular Program Cost Only						
Per Pupil Cost	$ 998	$ 1,372	$ 850	$ 925	$ 860	$ 806
Per Classroom Cost	22,428	34,982	21,758	23,120	22,000	19,197

SES - Specialized Educational Services

TABLE 3

PER BUILDING GENERAL PROGRAM DATA COMPARISONS

DESCRIPTION	SCHOOL A	SCHOOL B	SCHOOL C	SCHOOL D	SCHOOL E	School District Average
1. Building Capacity: Number of Pupils	525	475	625	400	425	550
2. Actual Enrollment	331	290	392	255	307	405
3. Regular Classrooms	17	19	21	14	13	18
4. Kindergarten Rooms	2	1	2	1	2	2
Total Rooms	19	20	23	15	15	20
5. Teacher Allocation:						
Classroom	13.0	8.0	14.5	10.0	11.5	
Art, Music, Phy. Ed.	2.0	1.65	2.15	1.35	1.55	
Total	15.0	9.65	16.65	11.35	12.60	18
6. Pupil-Teacher Ratio	17.66:1	19.37:1	21.62:1	20.26:1	21.76:1	21.1:1
7. Classrooms used	13	8	15	10	12	17
8. Pupils per classroom used	20.38	23.37	22.7	25	23.66	22.35
9. Number & Percentage of space used:						
Regular	14 rooms 68%	8 rooms 40%	15 rooms 65%	10 rooms 60%	12 rooms 80%	85%
SES	4 rooms 21%	11 rooms 55%	2 rooms 9%	1 room 6%	1 room 7%	
Title I	1 room 6%	1 room 5%	3 rooms 13%	-0-	-0-	
10. Total Building Utilization	95%	87%	87%	66%	87%	85%
11. Potential Surplus Space	1 room 5%	-0-	3 rooms 13%		2 rooms 13%	

12. Uniqueness of Program in Using Surplus Space:

School A - 1 room (Specialized Educational Services, Title I, Office Space)

School C - 1 room (Math Lab)
1 room (Kindergarten Activity Room)
1 room (Additional Music Room)

School D - 2 rooms (British Primary)
1 room (Book Room)
1 room (Math resource and testing)

School E - room (reading, math lab)

The Task Force found that the uniqueness of programs housed in individual schools was crucial to properly interpreting cost data. This uniqueness will be evident when considering any school for closing. Future Close/No-Close Task Forces must give specific attention to both general program and cost data.

The question of how much could be saved if a school were to be closed was the next question the Task Force addressed. Actual per school budget expenditures were used in an attempt to answer this question (see Table 4). The Task Force determined what percentage of each line item of the budget for School "D" would result in cost-savings. Again, the Task Force ran into situations that prevented precise cost analysis, such as transferring teachers from School "D" to other buildings. Some children from School "D" could be absorbed into other schools without adding teachers. At the same time, a percentage of the staff would have to be transferred to other schools to prevent overcrowding. Whether that percentage would be 40 or 90 percent would depend on a number of factors. For these reasons, the Task Force felt uncomfortable providing specific cost-savings data based on accurate percentages. Rather, a percentage range of cost-savings was established. The conclusion the Task Force did reach was that closing a school would provide a cost savings of 25% or more of the previous year's actual budget expenditure for that school.

In summary, the Task Force came to the following conclusions:

(1) Closing a school with declining enrollments will provide a cost-savings to the school district. However, program uniquenesses are as important to consider as the actual financial data when making a close/no-close decision.

Table 4

POTENTIAL SAVINGS DERIVED FROM CLOSING SCHOOL D (255 Pupil Enrollment)

1974 EXPENDITURE		COST SAVINGS RANGE
1. Personal Expenses		
a. Administration	$ 12,050	100%
b. Teachers, Librarians	157,685	10-30%
c. Substitutes	2,439	10-30%
d. School Aides	4,942	100%
e. Lunch Supervision	1,665	100%
f. Clerical	8,123	100%
2. Other Instructional Resources	10,125	-0-
3. Local Programs		
a. Intramurals	577	100%
4. Facilities Expense		
a. Custodians	22,133	60-100%
b. Utilities	8,817	60-100%
c. Custodial Supplies & Equipment	988	60-100%
d. Repairs & Replacement (Building & Site)	604	60-100%
e. Improvements & Additions (Building & Sites)	409	100%
f. Repairman Salaries	639	60-100%
	$231,200	25% +

The above computations show that a cost savings of approximately 25% + would be realized if School "D" were to be closed and all of the following assumptions used to arrive at the figures were real.

The assumptions used included:

(1) An administrator would not be necessary.

(2) There would be a 10-30% cost savings of teacher salaries and substitute costs.

(3) School lunch supervision and clerical costs would not be necessary.

(4) All instructional costs would continue as part of regular formula accounts.

(5) 60-100% custodial salaries, supplies, utilities, and repair and replacement would be cost savings.

(6) All improvements and additions would be eliminated.

These cost savings may be modified by increased costs such as transportation costs at approximately $7,500 per added bus run.

(2) Each individual school has program uniquenesses that will cause the cost savings to vary between schools.

(3) 25 percent or more of a school's previous year's actual budget expenditures would be saved if that school were to be closed.

(4) Cost-savings can be offset by various factors. For example, added transportation costs at approximately $7,500 per additional bus run, may offset the cost-savings realized by closing a school.

(5) Financial cost-savings is only one criteria to consider when deciding to close a school. Of equal importance is the impact that a school closing has on the social and economic fabric of the neighborhood and the city as a whole.

(6) Cost-savings should also be analyzed in terms of the total school budget and its effect on the individual taxpayer. For example, a cost-saving of $50,000 or even $200,000 from a school closing is minimal to the individual homeowner. The owner of a home with a market value of $35,000, which represents the approximate average cost of a single-family dwelling in the City of Madison, paid $562 in school taxes in 1975 (see Table 5). If the school tax levy increased $50,000 or even $200,000 to keep a school open, the homeowner's school tax would increase only $1 or $4 respectively.

TABLE 5

SCHOOL TAX ANALYSIS (1975 BUDGET YEAR)
City of Madison

			Net Taxes on House[4]								
		Market Value	$15,000	$20,000	$25,000	$30,000	$35,000	$40,000	$45,000	$50,000	$55,000
City's Share Of Tax Levy[1]	Increase in Levy[2]	Assessed Value* Net Tax Rate[3]	$ 9,750	$13,000	$16,250	$19,500	$22,750	$26,000	$29,250	$32,500	$35,750
$38,069,455	-	24.72	$241	$321	$402	$482	$562	$643	$723	$803	$884
$38,119,455	$50,000	24.75	$241	$322	$402	$483	$563	$644	$724	$804	$885
$38,169,455	$100,000	24.78	$241	$322	$402	$483	$563	$644	$725	$805	$886
$38,319,455	$200,000	24.88	$243	$323	$404	$485	$566	$647	$728	$809	$890
$38,569,455	$400,000	25.05	$244	$325	$407	$488	$570	$651	$733	$813	$895
$38,919,455	$800,000	25.27	$246	$329	$411	$493	$575	$657	$739	$821	$903

*Based on 65 percent of market value.
[1]The City pays approximately 91% of the total taxes levied for the Madison Public Schools.
[2]This represents the City's share (91%) of a hypothetical increase in tax levy.
[3]The school tax rate reduced to provide for allocated State general property tax relief.
[4]The actual taxes paid by a property owner, after deducting an allocation for State general property tax relief.

RECOMMENDATIONS

The following are the Task Force's recommendations regarding the 3 specific charges given to it by both the Board of Education and the Common Council. The recommendations fall into 5 areas:

(1) update and adopt the Master Plan for School Facilities,

(2) adopt additional policies complementary to those in this report,

(3) adopt an annual review process of elementary schools and enrollments, including use of task forces to consider school boundary changes and school closings,

(4) adopt a policy and procedure on community use of school buildings,

(5) undertake steps to encourage stable or increased enrollments in transitional neighborhoods.

UPDATING AND ADOPTION OF MASTER PLAN FOR SCHOOL FACILITIES

As mentioned previously, the Master Plan has neither been reviewed nor updated following its development in February, 1970. Since 1970, there have been some changes, such as in household sizes and mobility patterns which have affected school enrollments, and in elementary educational programs which have affected school enrollment capacities and school utilization. All of these changes should be considered in any long-range plan for school facilities.

It is recommended that the Master Plan be reviewed, updated, and adopted by the Board of Education as a general guide for long-range school facility planning. After its adoption, the Plan should be reviewed at least annually. The adopted Master Plan should serve as a

guide to the Board of Education and any committee or task force reviewing any considerations affecting school facilities, such as school boundary changes, school closings, community use of school buildings, additions and renovations to existing schools, school site acquisitions, and construction of new schools.

ADOPTION OF POLICIES

Within the Master Plan for School Facilities, certain objectives and policies relating to school facility planning were cited. It is the Task Force's opinion that many of the objectives and policies are important in that they serve as a basis for some of the Task Force's recommendations. In reviewing the policies, the Task Force has made, in some cases, certain revisions and additions. Since the policies have not been previously adopted by the Board of Education, it is recommended that the Board adopt the following policies with certain revisions and additions. (The policies cited in the Master Plan are placed in quotations.)

School Integration

"It is the opinion of the Board that integration cannot be accomplished solely through the school system but will instead require a concerted effort by all members of the community." It shall be an objective of the Board to promote and foster socio-economic and racial integration of both students and teachers within the school.

Elementary School Attendance Areas

"The neighborhood elementary schools have served the Madison community well in the past when education was a simpler process, and contemporary life and society were less complex." Such schools were constructed to serve relatively small residential areas with small

enrollments and a walk-in population. However, recent enrollment shifts and program changes forced a modification of the neighborhood school concept. It shall be the intent of the Board to keep schools open and examine ways to promote their efficient use by the following:

(1) to build new schools only after available classroom space in the district is utilized.

(2) "to enlarge the attendance areas served by certain elementary schools in order to maintain or improve quality instruction and to lower the per capita cost of operating such school."

(3) to use the schools for community purposes.

Boundary Changes

In order to implement the above policy regarding elementary schools, it will be necessary to occasionally change attendance area boundaries to relieve overcrowding or to increase enrollment.

(1) The Board shall approve attendance areas and boundary changes. Public announcement of a boundary change shall be made far enough in advance of the effective date of the change to allow for a public hearing pertaining to the announced change (presently Board of Education, Policy No. 7412).

(2) Except in unusual circumstances, all recommendations for boundary changes shall be made to the Board by March 15, if the change is to take effect the following Fall school term. Board action is recommended before April 15.

(3) If the Board does not adopt the Plan recommended by the Superintendent of Schools or the boundary advisory committee at its designated meeting, or if an alternative plan is suggested at this meeting, the matter shall be referred to the next regular Board meeting for further public appearances and Board action.

(4) The following factors shall be considered when boundary changes are recommended:

(a) effect on the educational program of the school and the district,

(b) socio-economic and racial integration,

(c) vertical continuity within the cluster of elementary, middle and high schools,

(d) transportation time, distance and hazardous routes,

(e) maintainance of a walk-in population,

(f) avoid repeated moves of Special Education students from school to school,

(g) available classroom space in the school system,

(h) policies and goals of cities, towns and villages in the area to be effected by the change,

(i) long-term suitability and conformance to the Master Plan for School Facilities, and

(j) mobility incurred because of Board's action.

Low Enrollment and Central City Elementary Schools

"The Board is aware of the role it can assume in the development and improvement of the Madison community in cooperation with other local governments. The Board is also aware that the school system can be an instrument for attracting and holding desired population elements in the central city and for solving or holding in check some of the problems attendant in these areas."

(1) "Therefore, it shall be the policy of the Board to continue the operation of elementary schools in the central city if such can be done without lowering the quality of the educational program to be offered in such schools."

(2) In order to continue the operation of existing small schools, boundary changes, alternative programs, and rental of declared surplus space shall be encouraged.

(3) Such schools may be used as sites for district-wide alternative or special programs. (see Appendix A - Open Enrollment or Magnet Schools.)

(4) It shall be the policy of the Board to cooperate and consult with city officials regarding the use and continuation of low enrollment and central city schools.

(5) Each school and the neighborhood it serves is unique and should be evaluated on its own merits. The continued operation of a school shall be evaluated when one or more of the following conditions exist:

(a) enrollment is low and projections indicate a continued decline in enrollment,

(b) a large proportion of space is declared surplus or is rented, and

(c) the per classroom cost, after adjustments for special education programs, is substantially above average for the school district.

(6) School closing decisions shall occur only after a review process which includes the "Long Range Planning Committee" and the use of a community "Close/No Close Task Force". Opportunity for public hearings shall be assured by the Board.

Location of Special Education Classrooms

(1) It shall be the policy of the Board to regard special education as an integral part of the regular education program.

(2) It shall be the policy of the Board of Education to have special education programs located in regular schools as close to their homes as possible so that children with exceptional educational needs are educated at the least distance from mainstreamed society.

(3) Due to the special nature of some handicaps and facilities or staff requirements, it may be necessary to operate some centralized programs in regular schools.

(4) All of the above shall be considered when boundary or program changes result in moving children from one facility to another.

Renovating Existing School Buildings

"It shall be the policy of the Board to continue to repair and renovate existing school buildings to provide the facilities required for the educational program." The purpose of such building improvements would be to foster equal educational opportunities in all elementary schools.

Transportation of Students

(1) "It shall be an objective of the Board to promote and develop a program for expanded student use of the city bus system. It is the option of the Board that such program would be of benefit to the entire community."

(2) "It shall be the policy of the Board to transport students when necessary to alleviate the overcrowding of schools or if the number of students within an attendance area is so small that the use of the present facility must be terminated for educational or economic reasons."

(3) In the case of an overcrowded school, it shall be the policy of the Board to assign students residing in new residential growth areas to other schools.

School-Community Programs

(1) It shall be an objective of the Board to expand the present program of cooperative use of school facilities by both the school system and the community to include both educational and other community uses.

ANNUAL REVIEW OF ENROLLMENTS AND ELEMENTARY SCHOOLS

The continuous changes in number of households, household population size, and the distribution of households throughout the school district will result in enrollment increases in some elementary attendance areas and enrollment decreases in other areas. The effect of these enrollment gains or losses may require school boundary changes, transportation of students from overcrowded schools to other under-utilized schools, alternative educational programs or community uses in schools with declining enrollments and/or surplus space, and possible school closings.

Establishment of Annual Review Process

Because of changes in enrollment patterns, possible changes in educational programs in certain elementary schools, and potential community uses of certain elementary school buildings, it is recommended that an annual review process be established. This review will analyze actual and projected enrollments of all elementary schools, the capacities and utilizations in relation to the educational programs conducted within such schools, and community needs of school buildings. This annual review can also serve as a part of a process to continually review and update the Master Plan for School Facilities.

The purpose of the annual review would be as follows:

(1) to identify any potential problems relating to elementary schools, such as a possible boundary change or transporting of students from overcrowded schools to other schools, changes in educational programs, alternative uses and rental of surplus spaces, and school closings,

(2) to establish clearly a procedure for decision-making in attempting to resolve such problems,

(3) to provide for more citizen participation by involving the community in the process of both problem identification and problem solution (see Chart 2), and,

(4) to provide for the development of alternatives and recommendations regarding solutions to the problems.

To facilitate this annual review process, it is also recommended that there be established a Staff Data Review Committee composed of the 4 Area Directors and a representative from the Madison City Planning Department. The Staff Committee will be advisory to the Superintendent of Schools. It is further recommended that there also be established a Long-Range Planning Committee composed of the following:

(1) all members of the Board of Education,

(2) the Chairperson or the Chairperson's designee of each of the 4 area advisory councils,

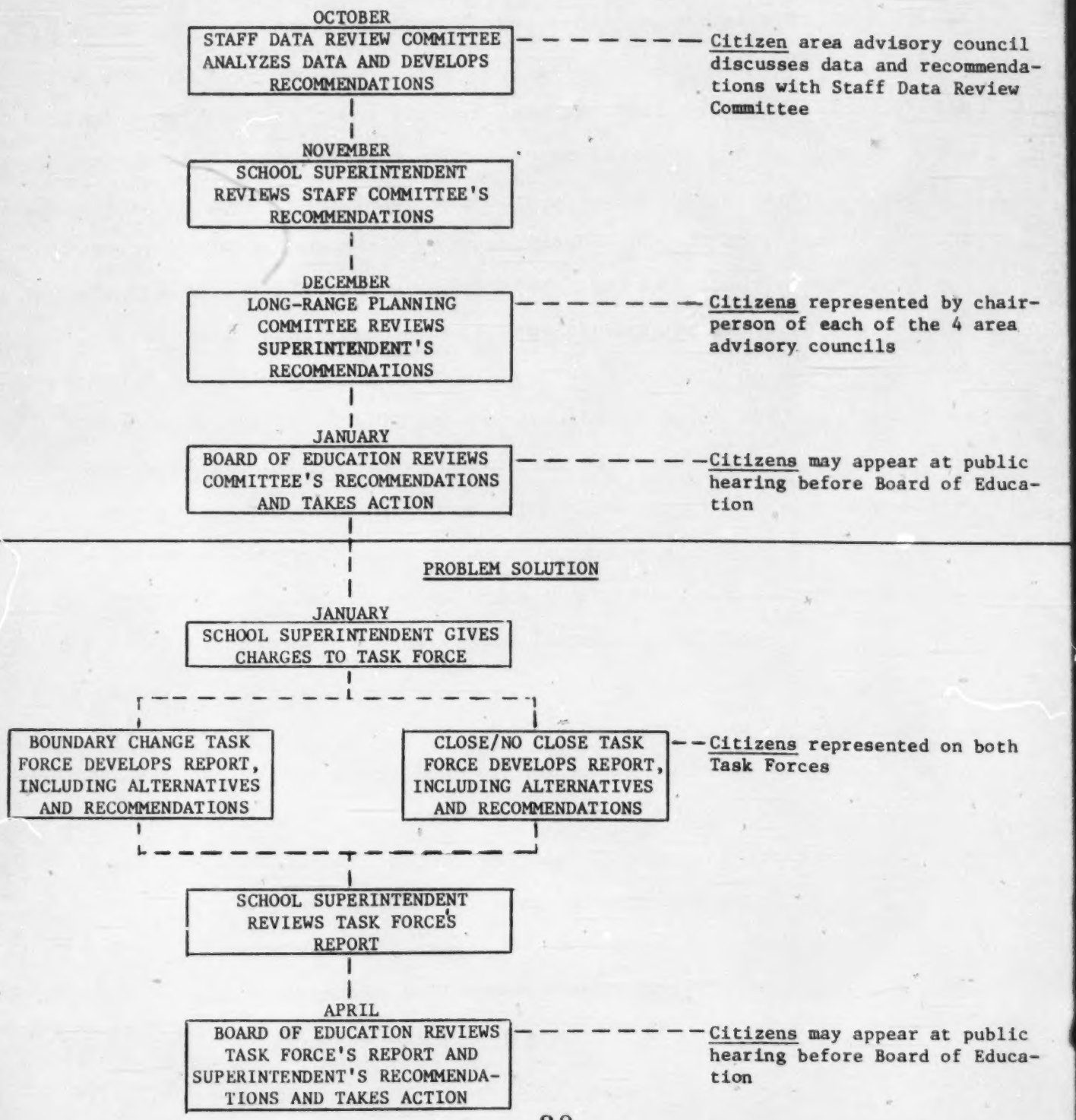
(3) one teacher representative selected by Madison Teachers Inc., and,

(4) two members of the Joint Fiscal Control Group, the members being selected by such Group. (It is recommended that one of the two members be a member of the Common Council - Board of Education Liason Committee.)

The Long-Range Planning Committee will be advisory to the Board of Education.

CHART 2

CITIZEN INVOLVEMENT IN ANNUAL REVIEW PROCESS


PROBLEM IDENTIFICATION
OCTOBER
STAFF DATA REVIEW COMMITTEE ANALYZES DATA AND DEVELOPS RECOMMENDATIONS
Citizen area advisory council discusses data and recommendations with Staff Data Review Committee
NOVEMBER
SCHOOL SUPERINTENDENT REVIEWS STAFF COMMITTEE'S RECOMMENDATIONS
DECEMBER
LONG-RANGE PLANNING COMMITTEE REVIEWS SUPERINTENDENT'S RECOMMENDATIONS
Citizens represented by chairperson of each of the 4 area advisory councils
JANUARY
BOARD OF EDUCATION REVIEWS COMMITTEE'S RECOMMENDATIONS AND TAKES ACTION
Citizens may appear at public hearing before Board of Education
PROBLEM SOLUTION
JANUARY
SCHOOL SUPERINTENDENT GIVES CHARGES TO TASK FORCE
BOUNDARY CHANGE TASK FORCE DEVELOPS REPORT, INCLUDING ALTERNATIVES AND RECOMMENDATIONS
CLOSE/NO CLOSE TASK FORCE DEVELOPS REPORT, INCLUDING ALTERNATIVES AND RECOMMENDATIONS
Citizens represented on both Task Forces
SCHOOL SUPERINTENDENT REVIEWS TASK FORCES REPORT
APRIL
BOARD OF EDUCATION REVIEWS TASK FORCE'S REPORT AND SUPERINTENDENT'S RECOMMENDATIONS AND TAKES ACTION
Citizens may appear at public hearing before Board of Education

It is intended that the Staff Data Review Committee will, at the beginning of each school year, collect and analyze various types of data on elementary schools, such as type of educational program, actual and projected enrollments, and school utilization. Following such data collection and anlysis, the Staff Committee will discuss the data together with its findings with each of the 4 area advisory councils. After receipt of any suggestions or input from the area advisory councils, the Staff Committee will prepare a report consisting of alternatives and recommendations for the Superintendent of Schools. After reviewing the Staff Committee's report, the Superintendent will transmit the report with personal recommendations to the Long-Range Planning Committee which in turn will make advisory recommendations to the Board of Education. The Board of Education will take final action, which, in some cases, could result in the creation of task forces to review possible boundary changes or school closings. (For further information on the procedure for the annual review, types of data to be collected and analyzed, and possible recommendations by the Staff Data Review Committee, see Appendix B - Annual Review of Enrollments and Elementary Schools).

Boundary Change Task Force

Should the Board of Education in the annual review process, decide that a substantial boundary change is warranted, it is recommended that the Board direct the Superintendent of Schools to create a Boundary Change Task Force whose members would include the following:

(1) one parent from each affected school, such parent appointed by the school parent organization,

(2) three parents from non-affected schools anywhere in the school district, such parents appointed by each school parent organization or the area advisory council, and,

(3) three members of an area advisory council's Long-Range Planning Committee. (It is recommended that a Long-Range Planning Committee be established for each of the 4 area advisory councils, such membership including the Chairperson and 2 other members of the area advisory council.)

The Superintendent of Schools will identify the affected and non-affected schools. To aid the Task Force, the principals of the affected schools, the Area Director, and a representative from the Madison City Planning Department will serve as resource members.

The Boundary Change Task Force will be advisory to and will receive specific charges from the School Superintendent. The purpose of the Task Force would be as follows:

(1) to provide citizens the opportunity to participate in seeking solutions to problems that affect them,

(2) to provide objectivity in resolving boundary change issues,

(3) to provide district-wide coordination and long-range considerations in decisions concerning boundary changes, and,

(4) to develop alternatives and make recommendations to the Superintendent regarding boundary changes.

If a boundary change is to be implemented beginning in the Fall term, it is suggested that the Task Force be created by January of the same

year so that it might be able to submit its recommendations to the Superintendent by March 1. (For further information on procedure for Task Force, see Appendix C - Boundary Change Task Force).

Close/No Close Task Force

If the Board of Education in the annual review process decides that there may be a potential for discontinuing any elementary school, it is recommended that the Board direct the Superintendent of Schools to create a Close/No Close Task Force. The Task Force would be advisory to and receive specific charges from the Superintendent. The primary purposes of the Task Force would be two-fold: (1) to provide for community involvement in the decision-making process relative to the possible closing of an elementary school, and (2) to develop at least two alternatives, and make priority recommendations on each of the alternatives to the Superintendent regarding any school identified for possible closing.

The members of the Task Force should not exceed 13 and should include the following:

(1) one parent chosen by the parent group of the school identified for possible closing,

(2) one parent chosen by the parent group of each of the other schools which may be affected by such school closing,

(3) alderperson(s) or town or village board member of the area in which the school identified for closing and other affected schools are located,

(4) chairperson of the area advisory council in which the school is located,

(5) one representative from the Staff Data Review Committee,

(6) one member selected by the neighborhood association(s) included in the elementary attendance area of the school identified for closing, and,

(7) one teacher representative selected by Madison Teachers Inc.

The Superintendent should identify the affected schools and the neighborhood association(s). To aid the Task Force, resource members, such as the Area Director, the principals of the affected schools, the Madison Public Schools' Attorney, a representative from the Madison City Planning Department and a representative from the Department of Housing and Community Development, should be provided.

The closing of an elementary school can have a detrimental effect on a residential neighborhood because a school is regarded by many as one of the most desirable amenities in any residential area. Although there may be some savings through closing a school, the social and economic costs to the neighborhood may offset all or a portion of such cost-savings. To insure that careful consideration has been given to any decision to close or not to close a school, it is recommended that full citizen involvement be provided in the deliberation process, and that all factors be considered, such as the economic and social impact on a neighborhood, the impact on a school receiving students from a closed school, the educational program of the school designated for possible closing and the receiving school, and cost comparisons between keeping a school open and closing a school. (For further information on procedures and types of data to be considered by the Close/No Close Task Force, see Appendix D - Close/No Close Task Force).

It is the intent of the Task Force that any economic savings from closing a school should not be the major criteria upon which a decision to close a school should be based. Other factors, such as the impact of school closing on the social and economic fabric of the neighborhood and the actual dollar cost to the taxpayers, should be given equal consideration.

In evaluating the potential closing of a school, other alternatives which may be considered besides closing of the school could include: (1) no substantial changes to the school, (2) changing the nature of the school, such as alternative programs, (3) expanding the school by adding children from other areas, and (4) reduction in operating costs. In its report to the Superintendent, the Task Force must include the closing of a school as one of its alternatives. To allow for a thorough investigation and study, it is suggested that the Task Force be given at least 6 months to complete its report.

COMMUNITY USE OF SCHOOL BUILDINGS

Nationally, about 700 school districts have developed extensive programs to use schools as community centers to provide not only educational but also recreational, cultural, and a variety of social and community services to people of all ages. Many schools have been utilized on a nearly full-time basis through the cooperative efforts of the school districts, other governmental units and private groups. The joint use of schools usually has incurred an additional cost of about 2-8 percent of the net annual educational budget but, however, the utilization of the schools has increased approximately three-fold. In some cities, the additional costs have been shared jointly by the

school district and city. School districts which have developed "community schools" cite the following advantages:

(1) improved attitudes and performances of the students,

(2) provision of services to citizens near their homes, particularly for the pre-schoolers and the elderly,

(3) decreased fragmentation of social services by offering a variety of services at one location,

(4) better coordination and use of the community's human and financial resources,

(5) decreased vandalism in some neighborhoods, and,

(6) stabilization of deteriorating neighborhoods.

Recently, school districts, such as those in New York, Boston and Chicago, have built new schools or have renovated existing schools based on a concept of "joint occupancy" or "mixed use". This concept combines schools with community services and facilities, such as pre-school education and day care, health clinics, social and recreational activities, and in some cases, housing and commercial uses. The Madison Public Schools Recreation Department presently provides educational and recreational programs in some schools during after-school hours. Some adult educational programs have been offered by the Madison Area Technical College in certain schools during regular school hours.

It is recommended that further efforts be made to use school buildings for other community uses, especially through joint coordination and cooperation of the Board of Education with the City of Madison,

other municipalities, and private groups. Because of their geographic locations, some schools could serve as centers for certain types of community services, especially if the services are to be provided to nearby residents. Moreover, community use, especially of low enrollment elementary schools with surplus space, may provide better building utilization and may minimize the need to discontinue such schools. Portions of the schools' operating costs could be defrayed through rental of space.

In attempting to develop a procedure to allow for the community use of school buildings, the Task Force addressed itself to several problems, namely (1) the declaration of surplus space, (2) the legal concerns governing rental and use of surplus space, and (3) the administration and rental of surplus space.

Declaration of Surplus Space

It is the Task Force's intent that the space needs of the elementary educational program must be initially met before any space within a school building can be declared surplus and available for rent. The space requirements of an elementary school may vary from one school to another depending on the educational program conducted within the school building. These space requirements may alter the present criteria which determine the school's enrollment capacity and the availability of surplus space.

The determination as to whether or not surplus spaces exist and the declaration of such spaces for rental should be made during the annual review process. The identification of surplus spaces within elementary schools should be performed jointly by the Staff Data Review

Committee and the building principals following an evaluation of the educational program requirements of all elementary schools. The Staff Data Review Committee would present its recommendations regarding the availability and use of surplus space to the School Superintendent and to the Board of Education for final consideration.

Legal Concerns Governing Rental and Use of Surplus Space

The Board of Education has been advised by the City Attorney that it cannot subsidize any programs which it has not formally voted to embrace. It is recommended that in the rental of surplus space, the established rental rate should at least cover the operational costs. This would be a "break even" rate, since the Board would not be subsidizing programs outside its mandate and it would be in compliance with the law.

Most elementary schools are located in areas zoned for residential purposes. Because of such zoning, only uses compatible to residences could occupy surplus spaces in elementary buildings. During a trial period, if rental difficulties develop because of zoning restrictions or other reasons, the Board of Education and Madison Common Council may consider the establishment of a School Facilities Commission whose primary purpose would be to promote the rental of surplus space in school buildings. Besides working with neighborhood groups to adopt zoning text and/or map amendments which would permit compatible community groups to rent surplus space, the Commission could also serve as an advisory group to the rental agency. Some of the duties of the Commission could include (1) to suggest criteria to determine priorities for rental of space, (2) to aggressively notify neighborhood organizations and other agencies of the availability of space, and (3) to

receive information from prospective tenants and communicate their ideas and concerns to the rental agency and the school administration. The membership of the Commission could be 2 persons appointed by the Board of Education, and 3 persons appointed by the Mayor of the City of Madison with Common Council approval.

Administration and Rental of Surplus Space

The administration of surplus space in operating or discontinued school buildings would be under the jurisdiction of Madison Public Schools. However, it is recommended that the Real Estate Division of the Madison City Department of Administration serve as the rental agency and work jointly with the Madison Public Schools' Business Services Department to rent surplus space.

The Real Estate Division is recommended because it has the expertise and experience in this work and is already performing a similar function for the City of Madison. Furthermore, it is aware of the space needs of certain public agencies and can serve as the coordinator to insure that their needs are met.

Since it is intended that surplus space be used to serve the needs of the community, it is further recommended that public, quasi-public, or institutional groups be given first preference in the rental of space. The rental rates to such groups should be "at cost" compared to rentals to a private group which should be at "market rate". (For further information on rental procedure, compatibility considerations, and rental rates of surplus space in operating or discontinued school buildings, see Appendix E - Rental of Surplus Space in Operating School Buildings, and Appendix F - Rental of Surplus Space in Discontinued School Buildings.)

The use of schools for community purposes is a beginning step that could be implemented through the cooperative efforts of the Board of Education, City of Madison, and other municipalities comprising the school district. Many schools are ideally located to serve not only the educational and recreational needs but also the cultural, health, and social needs of the community. Although the Task Force has explored the potentials of community uses of school buildings, it can only suggest that further studies be made to fully implement the concept of "community schools" which serve all of the community's needs.

LOW ENROLLMENT AND TRANSITIONAL NEIGHBORHOODS

The Task Force was requested to develop affirmative courses of action to be taken cooperatively by local governmental bodies and other community organizations to support and increase student enrollments in transitional neighborhoods. The Task Force believes that while schools do not wholly constitute neighborhoods, they can assume vital roles in them. There are other factors which are significant in the growth of a neighborhood as a desirable place for family living. These may include the types of available housing, parks and recreation, traffic and transportation, convenience to work and commercial services, and family perceptions about specific neighborhoods, schools or other amenities for residential living.

The above factors could not be studied in detail due to their complexity and the time period allotted to the Task Force. However, the Task Force recommends the following: (1) creating an ad hoc committee, (2) conducting surveys, and (3) establishing a communication process.

Creation of an Ad Hoc Committee

It is recommended that an ad hoc committee, consisting of 3 members each from the Madison City Plan Commission and the previously mentioned Long-Range Planning Committee, be established. One purpose of this committee would be to formulate for the Board of Education and the Madison Common Council policies and objectives to promote family living in low enrollment neighborhoods. The areas of concern could include housing, parks and recreation, neighborhood services, traffic and transportation, zoning, and taxation. This committee could also suggest methods to incorporate policies and objectives into a comprehensive land use plan. A land use plan is presently being prepared by the Madison Planning Department for consideration and approval by the Plan Commission and Common Council.

Conduction of Surveys

The Task Force recognizes that there are certain factors which influence family decisions to locate in certain neighborhoods. It is recommended that the School District and the City of Madison jointly explore the possibility of conducting a scientific survey to (1) specifically identify and prioritize these factors, (2) study and determine which factors can be influenced by public policy, and (3) develop policy recommendations based on such studies.

Because Madison Public Schools allows a variety of climates and styles of elementary programs which address each neighborhood's uniqueness, there are differences in the elementary schools. The Task Force is concerned that there are also myths and perceptions about the quality of educational programs and facilities available in certain schools. For example, during meetings about proposed

boundary changes, some parents charged that programs and facilities in some schools are inferior to others. It is recommended that survey data which reflects the needs of the schools and areas be continually collected and analyzed. A major reason is to share the information with the community in order to correct the misperceptions about schools and programs.

Establishment of Communication Process

To allow for joint coordination and cooperation between the Board of Education and other governmental bodies, it is recommended that the Board meet jointly with the following:

(1) regular meetings with the Madison City Plan Commission to discuss mutual concerns,

(2) occasional meetings with Dane County Regional Planning Commission to discuss enrollment and facility issues,

(3) regular meetings with Joint Fiscal Control Group (of Madison Joint School District No. 8) to discuss long-range school facility planning, and

(4) occasional meetings with certain City boards or commissions, such as Human Resources, Housing Authority, Transportation, and Equal Opportunities, to discuss policies and objectives and other mutual concerns.

APPENDIX A

OPEN ENROLLMENT OR MAGNET SCHOOLS

School districts which adopt "magnet" school programs allow students to voluntarily transfer from their assigned school into a special program which may attract pupils from a wide geographic area. The philosophic intent for the establishment of magnet schools may include:

Innovation: The educational system has trouble remaining current with the rapid changes in society. Innovative designs can be incorporated in small magnet school programs, and the successful features later transferred to the regular system after community acceptance is assured.

Options: Parents and teachers have an increasing interest in providing the learner with a school environment where talents can be maximized. While some groups demand that our schools should tighten discipline and return to the basics, other groups are requesting that schools be more flexible and accentuate the individual expectations of the self-motivated child. Magnet schools have been developed to give families and teachers a choice between traditional and more recently developed programs.

Socio-economic and racial integration: Some cities have developed high quality alternative or magnet programs in ghetto neighborhoods or central locations in order to attract a socially or racially balanced student body. Because of the highly attractive program, waiting lists usually develop, thereby assuring an integrated attendance pattern.

Low enrollment in some schools: Many American cities are experiencing a decline in the number of school-age children in their central areas while new housing at the boundaries of the district may produce crowding at peripheral schools. Magnet programs have been established at the low-enrollment schools to attract students to them, thus delaying new school construction.

Magnet schools may be organized as a school within a school, as a specific program within a school, as a learning center which students may attend part time, or as a school with a specific program. While some programs may incur the average expenses compared to the rest of the district, the high quality magnet programs may cost more per pupil than regular programs. One added cost factor may be transportation at school expense, although some districts require parental responsibility for transportation to a school outside the child's neighborhood.

APPENDIX B

ANNUAL REVIEW OF ENROLLMENTS AND ELEMENTARY SCHOOLS

I. Recommended Procedure for Annual Review

A. The Staff Data Review Committee will collect and analyze data on enrollments, school utilization, educational programs, etc. of all elementary schools. (Completed by October 15)

B. The Committee will review the data together with its findings with each of the Area Advisory Councils. (Completed by November 15)

C. After receipt of any recommendations or suggestions from an Area Advisory Council, the Committee will prepare a reporting consisting of alternatives and recommendations to the Superintendent of Schools. (Completed by November 25)

D. The Superintendent will present the Committee's report together with personal recommendations to the Long-Range Planning Committee. (Completed by first meeting of Board of Education in December)

E. The Long-Range Planning Committee will review both the report of the Staff Data Review Committee and the recommendations of the Superintendent and make advisory recommendations to the Board of Education. (Completed by first meeting of Board of Education in January)

F. The Board of Education will review and act upon the recommendations of the Long-Range Planning Committee. Examples of types of action taken by the Board may include directing the Superintendent to create a Boundary Change Task Force or Close/No Close Task Force (Completed by second meeting of Board of Education in January)

II. Suggested Types of Data to be Collected and Analyzed by Staff Data Review Committee

A. Madison Public Schools' staff

1. Educational Programs
   a. Regular program changes
   b. Special programs (example: Title I)
   c. Alternative programs (example: open classrooms)
   d. Special education needs

2. School utilization
   a. Space use for present programs
   b. Future space needs
   c. Cluster or area space needs
   d. Surplus space

3. Comparative school costs

B. Madison City Planning Department Staff

1. Actual and projected enrollments

2. Other population data
   a. Population size and composition
   b. Socio-economic
   c. Mobility pattern

3. Housing and zoning changes

4. Transportaion - bussing, traffic

III. Types of Possible Recommendations by Staff Data Review Committee to Superintendent of Schools

A. Over-utilized Schools

1. Educational Program
   a. The present program is satisfactory and there is no need for changes in utilization of the building or educational program.
   b. Program changes could be made in either of the following: special programs, alternative programs, special education, cluster needs.

2. Boundary Changes
   a. A modified boundary change is needed at a grade level or area which can be worked out by the school administration and affected parents.
   b. A Boundary Change Task Force should be created to make recommendations on boundary changes.

B. Under-utilized or Low Enrollment Schools

1. Educational Program
   a. The present program is satisfactory and provides a quality education for the children involved.
   b. Program changes should be made in the area of school organization (example: combination grade is needed).
   c. Program changes should be made in either of the following: special programs, alternative programs, special education, cluster needs.

2. Boundary changes (see 2. above)

3. The Board of Education should review the program and use of the school because over one-half of the space is declared surplus.

4. A Close/No Close Task Force should be created to make recommendations on possible school closing because the enrollment is low, a continued enrollment decline is projected, the building is vastly under-utilized, and the per classroom cost is far above the average for the School District after adjustments are made for special education students.

APPENDIX C

BOUNDARY CHANGE TASK FORCE

I. Recommended Procedure for Boundary Change Task Force

A. The Superintendent of Schools will give specific charges to the Boundary Change Task Force.

B. The Staff Data Review Committee will provide data packet and information concerning boundary changes to Task Force.

C. At its first meeting, the Task Force will organize itself, including voting procedures. A process facilitator will acquaint members with possible procedures and techniques which can be used by the Task Force. A process facilitator will be provided for subsequent meetings, if the Task Force so desires.

D. Early in its deliberations, the Task Force will hold a public meeting to discuss the boundary change issue with the affected parents and to hear their neighborhood concerns.

E. The Task Force will prepare a preliminary report consisting of alternatives and recommendations for boundary changes. Prior to preparation of its report, the Task Force will seek advisory recommendations from the school administration and the Madison City Planning Department.

F. The Task Force will hold a public hearing in the attendance area to discuss its boundary change alternatives and recommendations with affected area residents.

G. Following the public hearing, the Task Force will prepare a final report consisting of alternatives and recommendations for the Superintendent of Schools (The report will be due by March 1).

H. The Superintendent will present the Task Force's report together with personal recommendations to the Board of Education.

I. The Board will review and act upon the recommendations (Board action to be taken before April 15).

APPENDIX D

CLOSE/NO CLOSE TASK FORCE

I. Recommended Procedure for Close/No Close Task Force

A. The Superintendent of Schools will give specific charges to the Close/No Close Task Force.

B. The Staff Data Review Committee will provide a data packet and information concerning the potential school closing to the Task Force.

C. At its first meeting, the Task Force will organize itself, including voting procedures. A process facilitator will acquaint members with possible procedures and techniques which can be used by the Task Force. A process facilitator will be provided for subsequent meetings, if the Task Force so desires.

D. Early in its deliberations, the Task Force will hold a public meeting to discuss the school closing issue with the affected parents and to hear their neighborhood concerns.

E. A neighborhood subcommittee will be formed to prepare for the Task Force an impact statement on the effect of a school closing on that neighborhood. The neighborhood representative on the Task Force, together with the alderperson representing the area, will serve as co-chairmen of the subcommittee.

F. The Task Force will consider certain types of information identified in II below prior to developing its alternatives and recommendations. It is suggested that the Task Force simulate a school closing to better identify the pros and cons of any school closing, including implications on boundary changes, transportation of students, school cost-savings, and educational program.

G. The Task Force will prepare a preliminary report consisting of alternatives and recommendations on the potential school closing. Prior to preparation of its report, the Task Force will seek advisory recommendations from the school administration and the Madison City Planning Department.

H. The Task Force will hold a public hearing in the attendance area to discuss its alternatives and recommendations with the affected area residents.

I. Following the public hearing, the Task Force will prepare a final report consisting of alternatives and recommendations for the Superintendent of Schools.

J. The Superintendent will present the Task Force's report together with personal recommendations to the Board of Education.

K. The Board will review and act upon the recommendations.

II. Types of Suggested Information to be Considered by Close/No Close Task Force

A. Economic and Social Impact of School Closing in Neighborhood and City

1. Neighborhood profile
   a. Population characteristics
   b. Building permit analysis
   c. Area mobility analysis
   d. Zoning information
   e. Housing patterns
   f. Community use of school building
   g. Land use plan

2. Possible use of school building, if closed.

3. Characteristics of neighborhood indicating special education needs.

B. Impact of School Closing on Receiving School(s) and Children Involved

1. Data on available classroom space.

2. Assignment of children by neighborhood.

3. Program differences in schools involved.

4. Enrollment projections of receiving school(s).

5. After school activity changes.

6. Socio-economic and racial profile resulting from reassignment of children.

7. Transportation, in terms of safety, distance, and time.

8. Effect on middle school cluster and high school attendance area due to reassignment of children.

C. Comparison of Costs to Keep School Open Versus Closing

1. Detailed cost information on school proposed for closing.

2. Increased costs to receiving school(s).

3. Transportation costs.

4. Anticipated maintenance and remodeling costs of affected schools over next 5 years.

5. Per pupil and per classroom cost of school proposed for closing and of other schools and school district's average.

6. School cost-savings, including assumptions and basis of cost analysis.

7. Costs to taxpayer if school is maintained.

D. Educational Program at School Proposed for Closing (Including Effects of Low Enrollments)

1. Organizational plan, including number of children by grades.

2. Specialized Educational Services' allocation.

3. Effects of enrollment size on teaching methods.

4. Significant changes in students' achievement.

5. Attitudes of teaching staff and parents.

6. Types of population in school service area.

7. Possible alternative organizational and educational program to provide quality education.

APPENDIX E

RENTAL OF SURPLUS SPACE IN OPERATING SCHOOL BUILDINGS

I. Recommended Procedure for Rental of Space

A. Annually in the Fall or at other appropriate times, the Building Principal, Area Director and School Superintendent will jointly identify and declare the amount of surplus spaces available in a school building, and the duration such spaces can be rented.

B. The Building Principal will complete a surplus space form prepared by the Real Estate Division of the Madison City Department of Administration and transmit it to the Director of Business Services of Madison Public Schools. The Director of Business Services will serve as the liaison for the school administration and will work jointly with the Real Estate Division in the rental of space. (For further information on types of requested information on surplus form, see IV below.)

C. The Building Principal will inform parents and neighborhood groups via the school newsletter about the declaration of surplus spaces, their potential rental, and the possible compatible tenants. Any comments received from parents and neighborhood organizations will be forwarded by the Building Principal to the Director of Business Services.

D. The Director of Business Services will transmit the completed surplus space form to the Real Estate Division and also will authorize the Division to seek prospective tenants for rental of surplus spaces.

E. Based on a list of compatible tenants and specific criteria submitted by the school administration, the Real Estate Division will attempt to rent the surplus spaces. In any rental consideration, the public, quasi-public or institutional sector will be given first priority.

F. After finding a potential tenant(s), the Real Estate Division will consult with the Director of Business Services, who in turn will notify the Area Director and Building Principal about the tenant(s). A recommendation on the potential tenant(s) is made jointly by the Director of Business Services, Area Director, and Building Principal to the School Superintendent.

G. The School Superintendent will transmit personal recommendations on the tenant(s) and rental of surplus spaces to the Board of Education.

H. The Board will review and act upon the recommendations. Parents will be informed about the tenant(s) and rental of surplus space and will be afforded an opportunity to be heard before the Board takes action. The Board will approve all leases to tenants.

II. Compatibility Considerations of Potential Tenants

A. Must physical changes, such as renovations and remodelings, be made to accommodate the tenant(s), and what are the costs of the changes?

B. Will the tenant(s) be disruptive or distractive to the regular program, in terms of noise, traffic through common areas, etc.?

C. Will the tenant(s) be acceptable to the teaching staff and parents?

D. Will the tenant(s) cause transportation and parking problems?

E. What is the degree of supervision required of the building principal and are the tenants amenable to the authority of the principal?

III. Rental Rates and Rental Considerations

A. Rental Rates

1. Standard rate for public, quasi-public or institutional tenants (Same per square foot cost for all surplus spaces in school buildings).
   a. Develop inventory of all vacant surplus spaces.
   b. Determine per square foot cost of surplus space in each school by including (1) administrative charge of building principal and secretary, (2) utilities, (3) custodial salaries, supplies and equipment, (4) repairs and replacements, and improvements and additions to building and site, all to be pro-rated over a 10-year period, and (5) Real Estate Division's service charges.
   c. Calculate district average per square foot cost from pool of available surplus space.
   d. Rental rate will be a "break-even" rate to cover operational costs.

2. Market rate for private sector tenants.

B. General Rental Considerations

1. A new tenant should be given a one year lease until it is determined that such tenant is reliable and compatible with the regular school program.

2. After a one-year period, a reliable tenant should be given a 3-5 year lease to minimize work involved in renewal of lease and to offer stability of longer arrangement.

3. Any major repairs should be pro-rated over 10 years in order to keep rental costs at a uniform rate rather than increasing or decreasing from one year to another.

IV. Types of Information Needed by Real Estate Division on Surplus Space

A. Location of surplus space (name of school and room number).

B. Amount of available surplus space (size and area in square foot).

C. Term or length of time surplus space will be available.

D. On-site parking privileges, including number of available parking spaces.

E. Accessibility to building during days, nights, and weekends.

F. Use of gymnasium and other facilities.

G. Availability of janitorial service.

H. Rental rate.

APPENDIX F

RENTAL OF SURPLUS SPACE IN DISCONTINUED SCHOOL BUILDING

I. Recommended Procedure for Rental of Space

A. After deciding to discontinue a building for public school use, the Board of Education will continue to retain control and administration of the building for 3 years as a transitional period to allow for a long-term determination as to whether such a building will be used again for public school use.

B. Following the Board's decision for discontinuance and rental of the building, the Director of Business Services of Madison Public Schools will authorize the Real Estate Division of the Madison City Department of Administration to rent the entire building. The Director of Business Services will transmit any pertinent data on the building to the Real Estate Division.

C. The Real Estate Division will attempt to rent the building to different tenants based on certain considerations, such as public and private restrictions, suitability of tenants' programs to one another and acceptability of tenants to neighborhood residents and organizations. Rental may be to a prime lessee with provisions similar to those suggested in the Task Force's Report on the Dudgeon Building. In any rental consideration, the public, quasi-public or institutional sector will be given first priority.

D. After finding potential tenants, the Real Estate Division will consult with the Director of Business Services who in turn will notify the School Superintendent about the tenants.

E. The School Superintendent will transmit personal recommendations on the tenants and rental of spaces to the Board of Education.

F. The Board will review and act upon the recommendations. Any person desiring to be heard on the rental of space will be afforded such opportunity before the Board takes action. The Board will approve all leases of tenants.

G. Following a 3 year period and its determination that the discontinued school building will no longer be needed for public school use, the Board will declare the building surplus and offer it for sale. Because of the preference given to the public, quasi-public, and institutional sector in the rental of space, the sale of a school building will be in the following priority order: City of Madison or another municipality followed by a private purchaser.

II. Rental Rates and Rental Considerations

A. Rental Rates
   1. Standard rate for public, quasi-public or institutional tenants or "break even" rate to cover operational costs (see Appendix E III A 1).
   2. Market rate for private sector tenants.

B. Rental Considerations (same as Appendix E III B).